

# ELECTRONIC CASE FILING CM/ECF



## Attorney's Manual

United States District Court  
District of Puerto Rico

Office of the Clerk  
(Revised March 2004)

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# **Electronic Case Files System Attorney's Manual**

## **Getting Started**

### **Introduction**

This manual provides instructions on how to use the Electronic Filing System to file documents with the court, or to view and retrieve docket sheets and documents for all cases assigned to this system. Users should have a working knowledge of Netscape and Adobe Acrobat.

### **ECF System Capabilities**

The electronic filing system allows registered participants with Internet accounts and Netscape software to perform the following functions:

- Practice entering pleadings into ECF using a “training” database that is similar to the official live ECF database
- Electronically file pleadings and documents in actual (“live”) cases
- View official docket sheets and documents associated with cases
- View various reports for cases that were filed electronically

## **Requirements**

### **Hardware and Software Requirements**

The hardware and software needed to electronically file, view and retrieve case documents are the following:

- A personal computer running a standard platform such as Windows, Windows 95 or Macintosh
- An Internet provider using Point to Point Protocol (PPP)
- Netscape Navigator software version 4.5, 4.7 or 4.76; or Internet Explorer 5.5
- Software, such as Adobe Acrobat Writer or pdfFactory, to convert

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documents from a word processor format to portable document format (PDF).

- A scanner to transmit documents that are not in your word processing system. **Note: This would only be used for documents that cannot be produced electronically. Scanned documents lessen the level of service we provide by slowing down the entire system. Accordingly, we encourage the use of electronically produced documents (documents converted from wordprocessor to PDF) rather than scanned documents.**

## **PACER Registration**

ECF users must have a PACER account with the Court in order to use the Query and Report features of the ECF system. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may call the PACER Service Center at (800) 676-6856 or (210) 301-6440 for information or to register for an account. Also, you may register for PACER online at <http://pacer.psc.uscourts.gov>.

## **Registering for Access to ECF**

Participants will need to register with the courts to receive a login and password for the CM/ECF system. Registration forms can be obtained on our web site at <http://www.prd.uscourts.gov/cmecf/> or by calling the court.

Completed registration forms should be mailed to:

Clerk's Office  
U.S. District Court  
For the District of Puerto Rico  
Attn: ECF Attorney Registration  
Rm 150 Federal Building  
Chardon Street  
San Juan, PR 00918-1767

Once an account has been established, your login and password will be sent to you by the Office of the Clerk by regular, first-class mail.

Registered users can visit a training version of the system on the Internet at <https://ecf-train.prd.uscourts.gov> to practice ECF activities. We strongly recommend that registered users practice in the "training" ECF database before filing documents in the "live" ECF database.



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## Basics

### User Interactions

There are three general types of user interactions allowed by the system:

- Entering information in data fields
- Using command buttons to direct system activities
- Mouse-clicking on hyperlinks

### Conventions used in this Manual:

- Data to be entered by the user is shown enclosed in angle brackets: <data to be entered>.
- Command buttons are represented in this manual in **[bracketed boldface type]**.
- Hyperlinks are represented in **underlined boldface type**.

### User's Manual

You can download or view the most recent version of the ECF User's Manual (in PDF format) from the District Court's web page. Enter <http://www.prd.uscourts.gov/cmecf/>, when the court's web page opens, click on the **Electronic Case Filing** hyperlink.

## A Step-By-Step Guide

Below is a step-by-step guide for entering the system, preparing a document for filing, filing a motion or application, and displaying a docket sheet. We suggest that you go through the steps on the training data base before trying to actually file a document.

### How to Access the System

Users can get into the system via the Internet by going to

**<https://ecf.prd.uscourts.gov>**

Users can access the **Training Database** by going to

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<https://ecf-train.prd.uscourts.gov>



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## Logging In

The next screen is the login screen.

**ECF/PACER Login**

**Notice**  
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

**Instructions**  
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

In the future an access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER account. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

**Authentication**

Login:

Password:

client code:

CM/ECF has been tested and works correctly with Netscape 4.6x and 4.7x.

Enter your ECF Login and Password in the appropriate data entry fields. All ECF login names and passwords are case sensitive.

**Note:** Use your **ECF** login and password if you are entering the system to file a pleading or to maintain your account. If you only wish to enter ECF to query the database for case information or to view a document, enter your **PACER** login and password. Beginning January 2004 you will be charged a fee to view ECF case dockets and documents.

Verify that you have entered your ECF login and password correctly. If not, click on the **[Clear]** button to erase the Login and Password entries and re-enter the correct information. After you enter the correct login and password information, click on the **[Login]** button to transmit your user information to the ECF system.

- If the ECF system does not recognize your login and password, it will display the following error message on a new screen:

**Login failed either your login name or key is incorrect**



- Click on the **[Back]** button in your browser and re-enter your correct login and password.

The **Main Menu** will appear after logging successfully to ECF.



Once the **Main Menu** appears, choose from the following list of options on the top bar.




- Civil-** Select **Civil** to electronically file all civil case pleadings, motions, and other court documents.
- Criminal-** Select Criminal to electronically file all criminal case pleadings, motions, and
- Query-** Query ECF by specific case number, party name, or nature of suit to retrieve documents that are relevant to the case. You must login to **PACER** before you can query ECF.
- Reports-** Choose **Reports** to retrieve docket sheets and cases-filed reports. You must login to **PACER** before you can view an ECF report.
- Utilities-** View your personal ECF transaction log and maintain personal ECF account information in the **Utilities** area of ECF.
- Logout-** Allows you to exit from ECF and prevents further filing with your password until the next time you log in.

**Note:** The date ***you last logged into the system*** appears at the bottom left corner of this screen. You should review this information each time you login for security reasons. If you believe your last login date and time are incorrect, or suspect an unauthorized party is using your login and password, please telephone the court as soon as possible.

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
## Manipulating the screens

Each screen has the following two buttons:

-  clears **all** characters entered in the box(es) on that screen.
-  or  accepts the entry just made and displays the next entry screen, if any.

### Correcting a mistake:



Use the  button on the Netscape toolbar to go back and correct an entry made on a previous screen. However, once the document is transmitted to the court, only the court can make changes or corrections.

## Filing Documents for Civil Cases

There are eight basic steps involved in filing a document in a civil case:

- 1) Select the type of document to file (see Attorney Event Menu);
- 2) Enter the case number in which the document is to be filed;
- 3) Designate the party(s) filing the document;
- 4) Specify the PDF file name and location for the document to be filed.
- 5) Add attachments, if any, to the document being filed.
- 6) Modify docket text as necessary
- 7) Submit the pleading to ECF
- 8) Receive notification of electronic filing

## Filing Documents for Criminal Cases

There are nine basic steps involved in filing a criminal document:

- 1) Select the type of document to file (see Attorney Event Menu);
- 2) Enter the case number in which the document is to be filed;
- 3) Designate the defendant that the filing relates to;
- 4) Verify that the case number and caption are correct.
- 5) Designate the party(s) filing the document;
- 6) Specify the PDF file name and location for the document to be filed.
- 7) Add attachments, if any, to the document being filed.
- 8) Modify docket text as necessary

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- 9) Submit the pleading to ECF
  - 10) Receive notification of electronic filing

Follow the next steps to file a document in ECF:

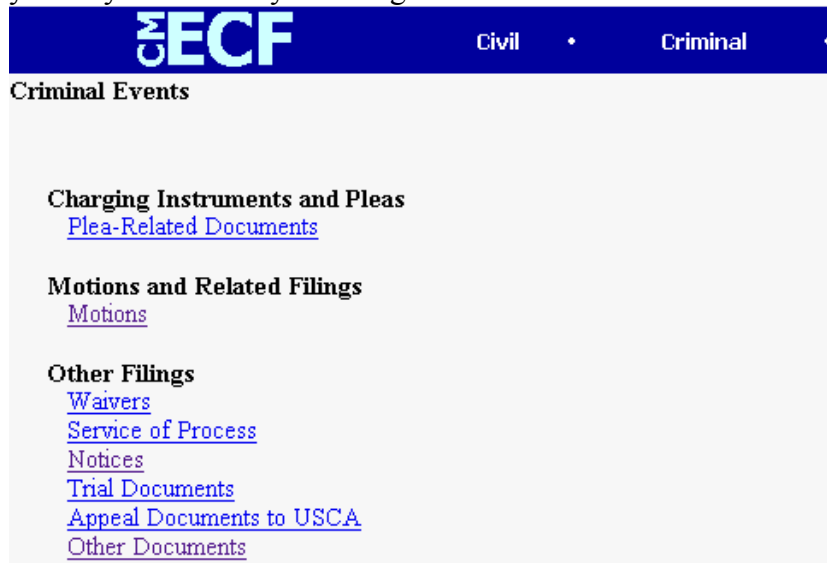
1. Select the type of document to file



**For civil cases** select Civil from the blue menu bar at the top of the ECF screen. The Civil Event window opens displaying all of the events from which you may choose for your filing.

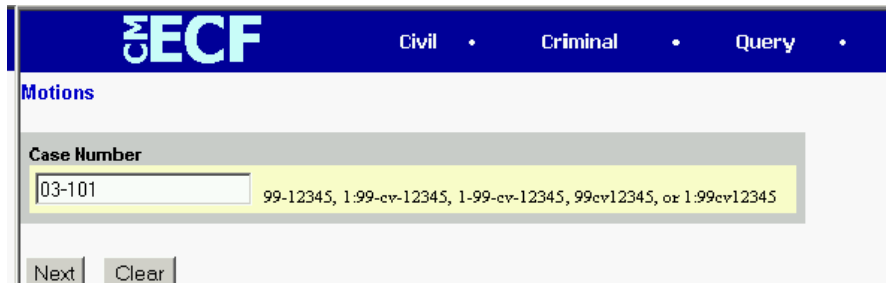


**For criminal cases**, select Criminal from the blue menu bar at the top of the ECF screen. The Criminal Event window opens displaying all of the events from which you may choose for your filing.



## 2. Enter the case number in which the document is to be filed.

A new screen opens with a Case Number field. Enter the number of the case for which you are filing a document (in this example a motion ) and click on **[Next]**.

The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header, the word "Motions" is displayed. A "Case Number" label is positioned above a text input field. The input field contains "03-101". To the right of the input field, a yellow tooltip box displays the text "99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345". At the bottom of the form are two buttons: "Next" and "Clear".

**Note:** if the case number you are working on is 3:00cr101, you could enter the case number in any of the following formats:

**02-100**

**02cr100**

**3:02-cr-100**

**3-02-cr-100**

**3:02cr100**

- If the number is entered incorrectly, click **Clear** to re-enter. If the computer prompts that you entered an invalid case number, click on **Back** to re-enter.
- When the case number is correct, click on **Next**.

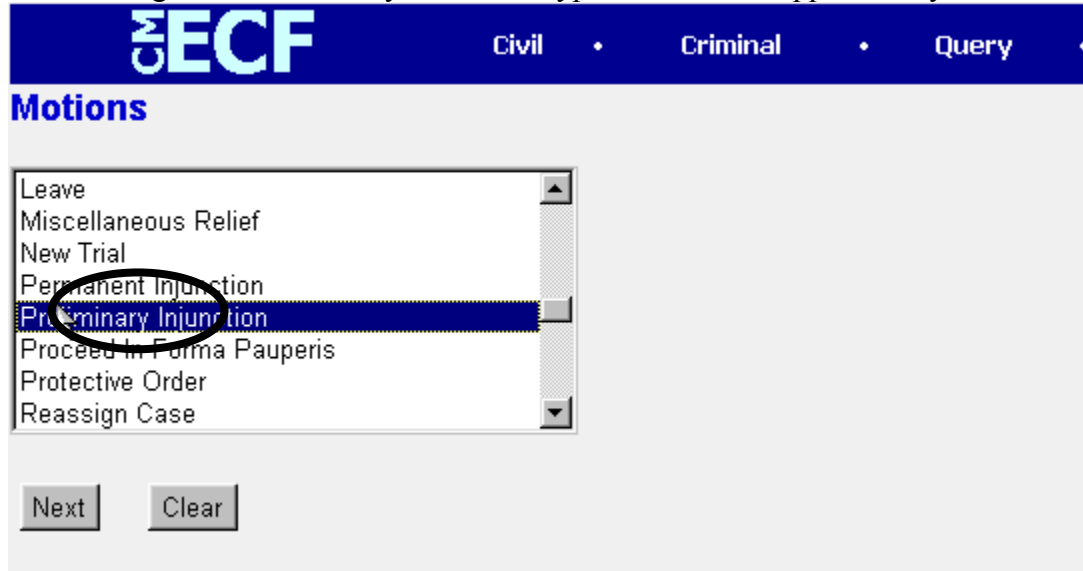
**A new screen will show you the case number and caption. Verify this is the case you intend to file to.**

The screenshot shows the ECF interface after the case number has been entered. The header is blue with the ECF logo and a "Civil" link. Below the header, the word "Motions" is displayed. The case number "3-03-cv-00101-HL" and the caption "Perez v. Rivera" are displayed in blue text. At the bottom of the form are two buttons: "Next" and "Clear".

Click **Next**

### 3. Select event type

Scroll through the menu until you find the type of motion or application you wish to file.



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header, the word "Motions" is displayed in blue. A scrollable list of motion types is shown, with "Preliminary Injunction" highlighted in blue. The other options in the list are Leave, Miscellaneous Relief, New Trial, Permanent Injunction, Proceed in Forma Pauperis, Protective Order, and Reassign Case. Below the list are two buttons: "Next" and "Clear".

For demonstration purposes, highlight **Preliminary Injunction** and click on [Next].

**Note:** To select more than one motion, press and hold down the **Ctrl** key, and click on each of the desired multiple forms of relief.

### 4. In civil cases, designate the party(s) filing the document

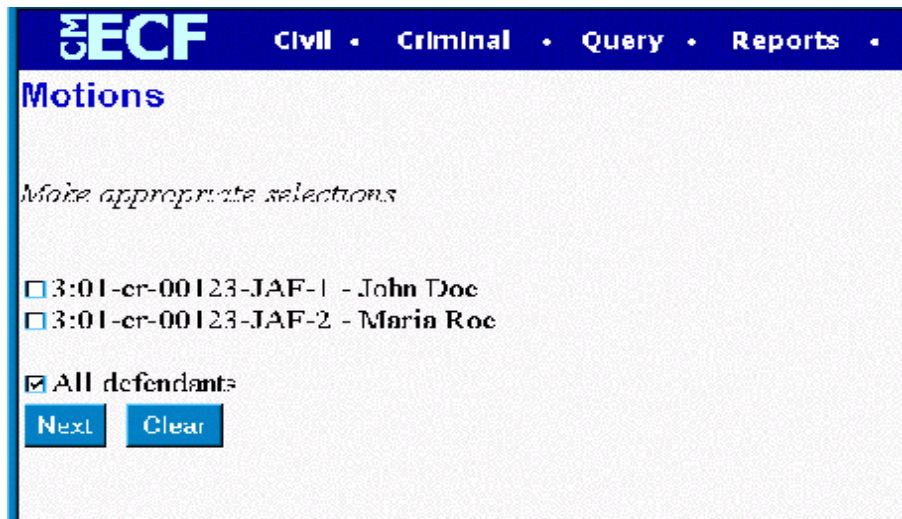


The screenshot shows the ECF interface for selecting the filer. At the top is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header, the word "Motions" is displayed in blue, followed by a link to "3:03-cv-00101-HL Perez v. Rivera". The main section is titled "Select the filer." and contains two columns. The left column is titled "Select the Party:" and has an "OR" label. It contains a list box with two entries: "Perez, Juan [Plaintiff]" and "Rivera, Pedro [Defendant]". The right column is titled "Select a Group:" and contains four radio button options: "No Group" (selected), "All Defendants", "All Plaintiffs", and "All Parties". Above these options is a link "Add/Create New Party". Below the list box and radio buttons are two buttons: "Next" and "Clear".

Highlight the name of the party or parties for whom you are filing the motion and click on the [Next] button. If you represent all defendants or all plaintiffs you may select the entire group by holding down the control key while pointing and clicking on each party of the group

Note: If your party does not appear, see the section of this manual titled **Add/Create New Party (only for civil cases)**.

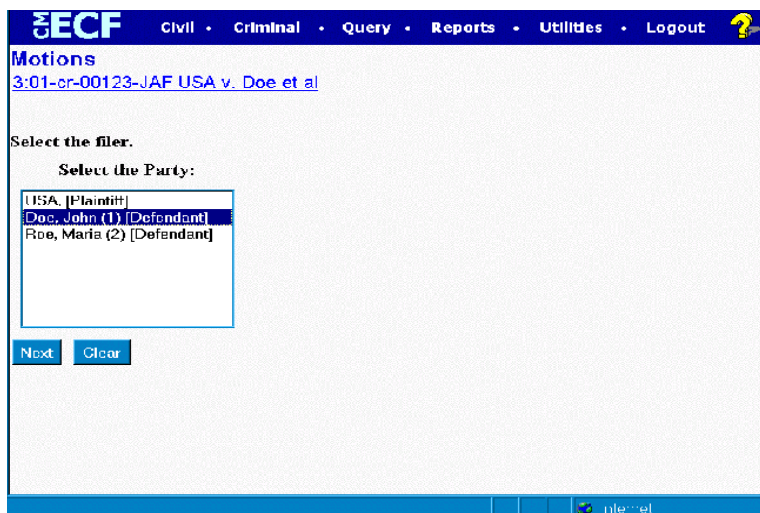
**In Criminal Cases you have to select the defendant(s) that the filing relates to, before designating the party**



The screenshot shows the ECF system interface. At the top is a blue navigation bar with the ECF logo and links for Civil, Criminal, Query, and Reports. Below this is a section titled "Motions" with the instruction "Make appropriate selections". There are three checkboxes: the first two are unchecked and labeled "3:01-cr-00123-JAF-1 - John Doe" and "3:01-cr-00123-JAF-2 - Maria Roe"; the third is checked and labeled "All defendants". At the bottom of this section are two buttons: "Next" and "Clear".

Click in the boxes to place a check next to each defendant's name that this filing relates to. If it relates to all defendants in the case, check the box for "All Defendants" and leave the other boxes unchecked. When finished selecting defendants click on **[Next]**.

**Then designate the party(s) filing the document - Highlight the name of the party or parties filing the motion. Click on the **[Next]** button.**



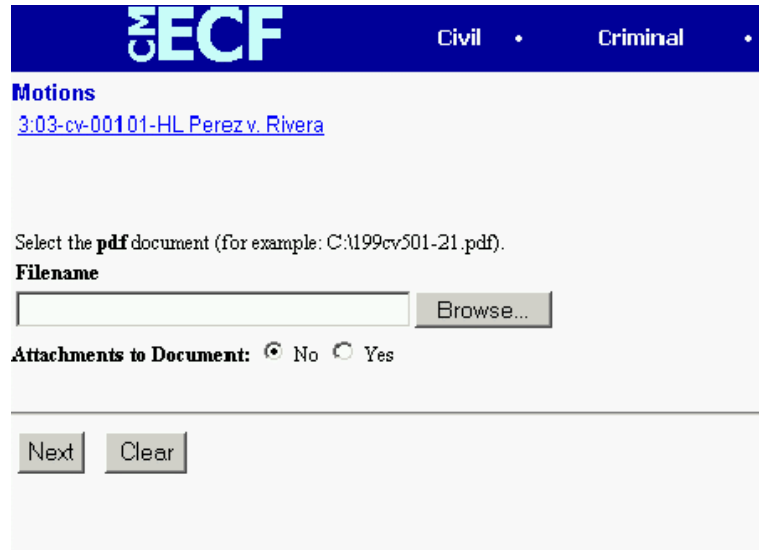
This screenshot shows the next step in the ECF system. The navigation bar now includes "Utilities" and "Logout" in addition to the previous links. The "Motions" section now displays the case number "3:01-cr-00123-JAF" followed by a link "USA v. Doe et al". Below this, it says "Select the filer." and "Select the Party:". A list box contains three options: "USA, [Plaintiff]", "Doe, John (1) [Defendant]", and "Roe, Maria (2) [Defendant]". The second option, "Doe, John (1) [Defendant]", is highlighted with a blue background. At the bottom are "Next" and "Clear" buttons. The Windows taskbar at the very bottom shows the "Internet" icon.



## 5. Specify the PDF file name and location for the document to be filed.

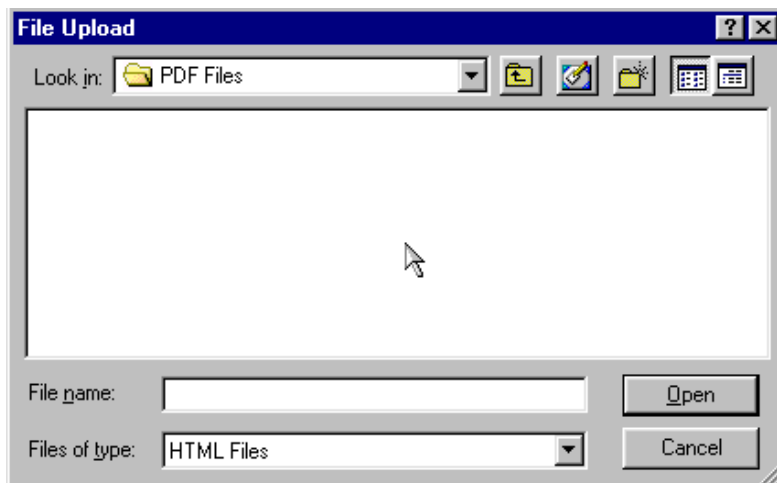
ECF accepts the party or parties you selected and refreshes the screen to display a new **Motions** screen depicted below. ECF displays a field for locating and entering the PDF file of the document (pleading) you are filing in ECF.

**Note:** It is imperative that you attach an electronic copy of the actual pleading when prompted by the system. All documents that you intend to file in ECF **MUST** reside in **PDF** format. Otherwise, ECF will not accept the document and users will be unable to retrieve and read your document from within ECF.



The image shows the ECF (Electronic Case Filing) interface. At the top is a blue header with the ECF logo and tabs for 'Civil' and 'Criminal'. Below the header, the page is titled 'Motions' and shows a case number '3:03-cv-00101-HL Perez v. Rivera'. A prompt asks the user to 'Select the pdf document (for example: C:\199cv501-21.pdf)'. There is a 'Filename' text box and a 'Browse...' button. Below this, there is a section for 'Attachments to Document' with radio buttons for 'No' (selected) and 'Yes'. At the bottom are 'Next' and 'Clear' buttons.

- Click on the **[Browse]** button. ECF opens the following screen.



- Change the **Files of type** from:

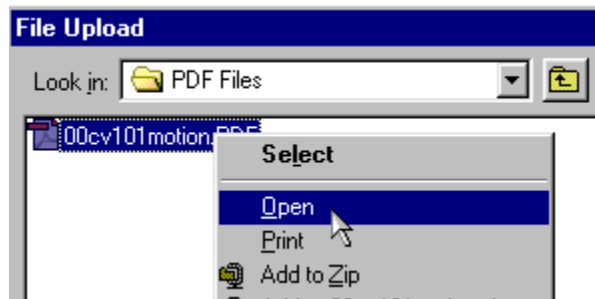


to:



- Navigate to the appropriate directory and file name to select the PDF document you wish to file.
- Highlight the file to upload to ECF.

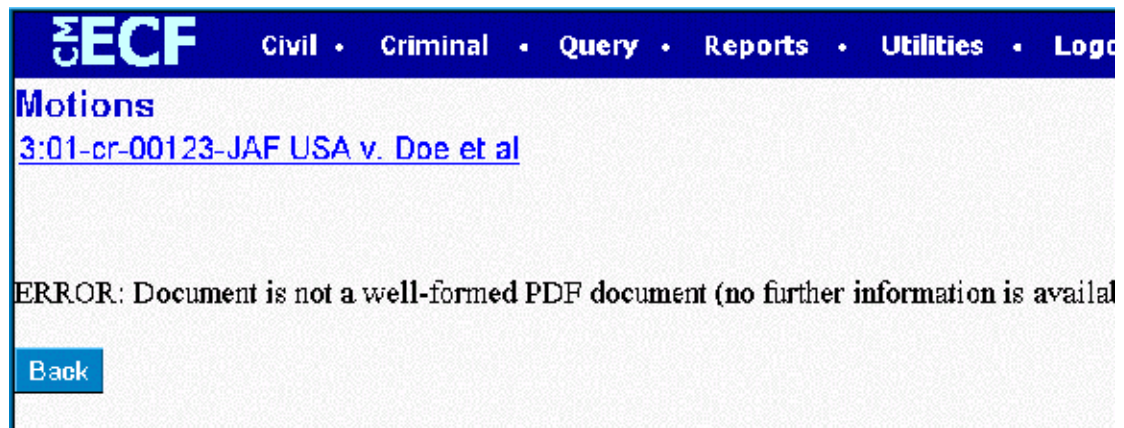
**Note:** In order to verify that you have selected the correct document, right mouse click on the highlighted file name to open a **quick menu** and left mouse click on **[open]**. Adobe Acrobat or Acrobat Reader will launch and open the PDF document that you selected. You should view it to verify that it is the correct document.



- Once you have verified the document is correct, close Adobe Acrobat and click on the **[Open]** button. ECF closes the **File Upload** screen and inserts the PDF file name and location in the **Motions** screen.

A screenshot of the ECF (Electronic Case Filing) system interface. The top navigation bar is blue with the ECF logo and links for 'Civil' and 'Criminal'. The main heading is 'Motions'. Below it, the case name '3:03-cv-00101-HL Perez v. Rivera' is displayed. The instruction 'Select the pdf document (for example : C:\199cv501-21.pdf).' is shown. There is a 'Filename' label above a text input field containing 'O:\CM-ECF Training\motion.pdf'. To the right of the input field is a 'Browse...' button. Below the input field, there is a label 'Attachments to Document:' followed by two radio buttons: 'No' (which is selected) and 'Yes'. At the bottom of the form are two buttons: 'Next' and 'Clear'.

In the event you selected and highlighted a file that is *not* in PDF format, ECF will display the following error message after you click on the **[Next]** button.

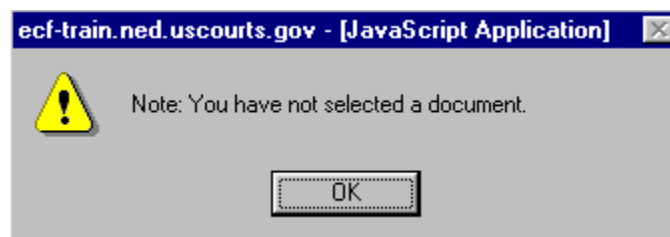


ECF will not permit you to select a file for your pleading that is not in PDF format.

- Click on the **[Back]** button and ECF will return to the **Motions** screen. Select and highlight the PDF file of your pleading and proceed as before.
- If there are no attachments to the motion, click on **[Next]**. A new **Motions** window opens. Go to Section 6, “**Modifying Docket Text,**” to proceed with your filing.
- If you have Attachments to your motion, you will select **[Yes]** on the screen depicted above. Click on **[Next]** and proceed to the first step in Section 5, “**Adding Attachments to Documents Being Filed**”.

### Failure to Select A Document to File

If you fail to select a document to file with your pleading, ECF will display the error message depicted below.



- If you click **[OK]** from the screen depicted above ECF will return you to the **Motions** screen. You cannot proceed without attaching a PDF document.

## 6. Add attachments to documents being filed

If you acknowledged the need to attach documents to your motion during the previous step, a new **Motions** screen appears.

U.S. District Court for the District of Puerto Rico - Microsoft Internet Explorer

Tools Help

Search Avomes Media

4.252/cgi-bin/Atgirn.p?65399422302240-L 311 0-1

Go Links

**ECF** Civil • Criminal • Query • Reports • Utilities • Logout

**Motions**

[3:01-cr-00123-JAF USA v. Doe et al](#)

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

Browse...

2) At your option, select a document type and/or enter a description.

Type Description

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Add to List

Remove from List

Next

- Click on **[Browse]** to search for the document file name of the attachment.
- Next to the field for attachment **Type**, click on the arrow and ECF opens a pulldown screen. Highlight the type of attachment from the displayed selection.
- To describe the attachment more fully, click in the **Description** box and type a clear and concise description of the attachment.
- Click on **[Add to List]**.

ECF adds the selected document as an attachment to the pleading. A new **Motions** screen opens to display the file name of the newly attached document.

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

C:\My Documents\reclassify\_guidelin Browse...

2) At your option, select a document type and/or enter a description.

Type Description

Appendix

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

C:\My Documents\reclassify\_guideline\_wo\_summons.pdf

Add to List

Remove from List

Next

- Repeat the sequence for each additional attachment.
- After adding all of the desired PDF documents as attachments, click on [Next].

## 7. Modify docket text

After you finish entering an attachment or submitting a document, the system will prompt you to provide a docket text.

ECF

Civil • Criminal • Query • Reports • Utilities • Log

Motions

[3:03-cv-00101-HL Perez v. Rivera](#)

Docket Text: Modify as Appropriate.

Click on the button shown here to open a modifier drop-down list. Select a modifier if appropriate.

ECF

Civil • Criminal • Query • Reports • Utilities • Log

Motions

[3:03-cv-00101-HL Perez v. Rivera](#)

Docket Text: Modify as Appropriate.

Click in the open text area to type additional text for the description of the pleading.

ECF


Civil • Criminal • Query • Reports • Utilities

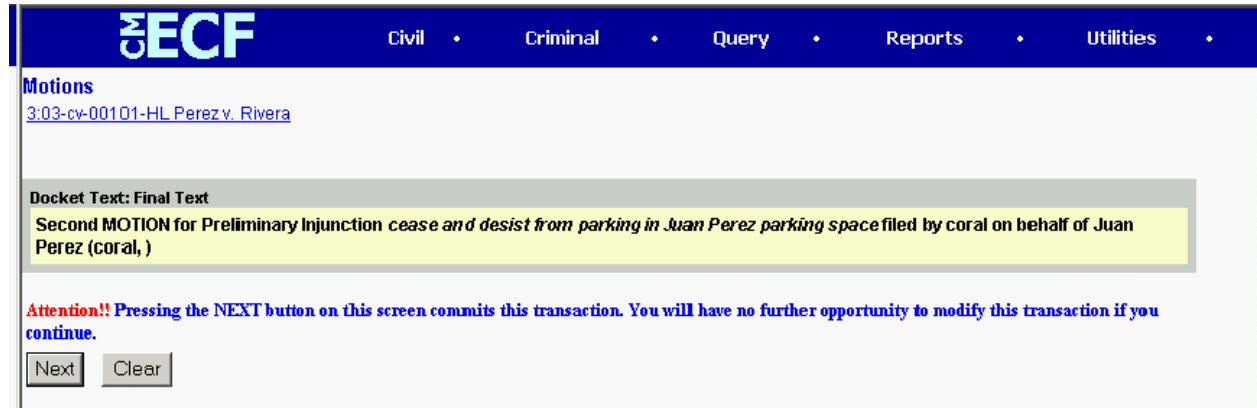
Motions

[3:03-cv-00101-HL Perez v. Rivera](#)

Docket Text: Modify as Appropriate.

## 8. Submit the pleading.

- Click on the [Next] button. A new **Motions** window appears with the complete text for the docket report.
- Review the docket text and correct any errors. If you need to modify data on a previous screen, click the  button on the Netscape toolbar to find the screen you wish to alter.



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Civil, Criminal, Query, Reports, and Utilities. Below this, the page title is "Motions" with a link to "3:03-cv-00101-HL Perez v. Rivera". The main content area has a header "Docket Text: Final Text" followed by the text "Second MOTION for Preliminary Injunction *cease and desist from parking in Juan Perez parking space* filed by coral on behalf of Juan Perez (coral, )". A red warning message states: "Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue." At the bottom are "Next" and "Clear" buttons.

- Click on the [Next] button to file and docket the pleading.

**Note:** The screen depicted above contains the following warning.

**Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.**

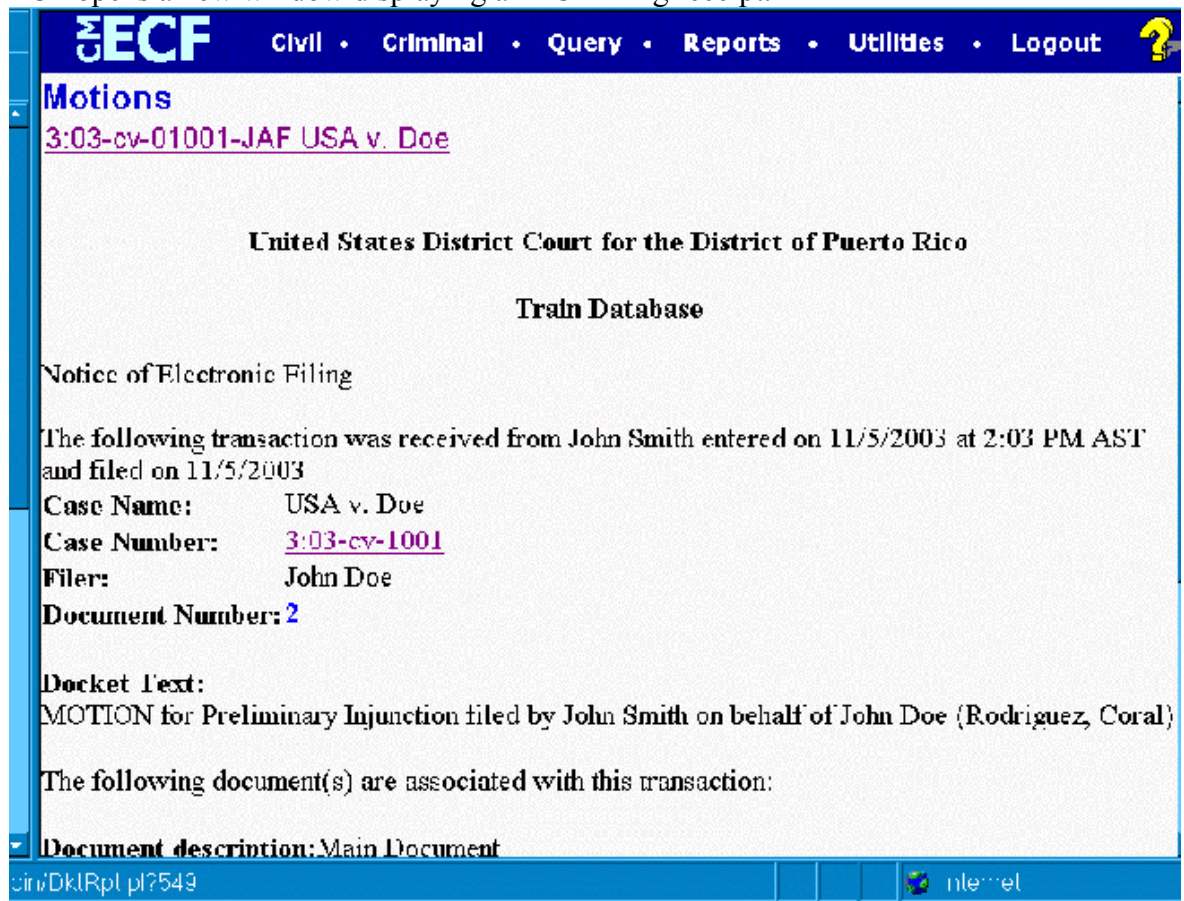
At any time prior to this step, you can abort the ECF filing or return to previous screens by:

- clicking on any hyperlink on the **Blue** ECF menu bar *to abort* the current transaction. ECF will reset to the beginning of the process you just selected.
- clicking on the Web Browser **[Back]** button until *you return to the desired screen*.



## 9. Notice of Electronic Filing

ECF opens a new window displaying an ECF filing receipt.



- The screen depicted above provides confirmation that ECF has registered your transaction and the pleading is now an official court document. It also displays the date and time of your transaction and the number that was assigned to your document. You should note this number on the document's PDF file.
- Select **[Print]** on the Netscape Toolbar to print the document receipt.
- Select **[File]** on the Netscape menu bar, and choose **Save Frame As...** from the drop-down window to save the receipt to a file on the hard drive of your computer.

**Note: The Notice of Electronic Filing represents your Certificate of Service. The Court strongly urges you to copy it to a file on your computer hard-drive, print it, and retain a hard copy in your personal files.**

- ECF will electronically transmit the **Notice of Electronic Filing** to the attorneys and parties to the case who have registered with the Court's CM/ECF Program. The ECF filing report also displays the names and addresses of individuals who will **not** be electronically notified of the filing. It is the **filer's** responsibility to serve hard copies of the pleading **and** the

---

**Notice of Electronic Filing** to attorneys and parties who are not set up for electronic notification.

#### **10. E-Mail Notification of Documents That Were Filed**

After a pleading is electronically filed, the ECF System sends a **Notice of Electronic Filing** to the designated attorneys and parties who have supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the **Notice of Electronic Filing**, **the system will ask for the ECF password (the one provided by the Court), and then the system will ask for your PACER login.** The filer is permitted one free look at the document *and* the Docket Sheet to verify that the pleading was properly docketed. The Court strongly urges you to copy the **Notice of Electronic Filing** *and* pleading documents to your hard-drive for future access. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

**Note:**

**In CRIMINAL CASES as well as in the SOCIAL SECURITY CASES only attorneys of record in the case are able to view pleadings in Criminal and Social Security cases via the Internet. To view documents, first login to ECF, then go to Reports, click on Docket Sheet, enter the PACER login, click on the document number.**

#### **Add/Create a New Party**

When posting an event (i.e. Third Party Complaint) where you need to add a party to the ECF system. If the party you represent is not listed in the "Select a Party" screen, click on **Add/Create New Party**. The screen depicted below will appear.



You must first perform a search to see if your party is already entered on the ECF system. Type the first few letters of the party's last name for an individual, or the first few letters of the company name. Click **[Search]**.



If a match is found, ECF will display a list of party names. If the name of the party you represent appears in the list, click on it and then click **[Select name from list]**. Review the party information and select the party's role in this filing. Click **[Submit]**.

If a match is not found, or your party does not appear in the list, click **[Create new party]**.

ECF displays the following screen:

The screenshot shows the ECF Party Information form. At the top is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header, the title "Party Information 2/9/2002" is displayed. The form contains several input fields: Last name (with "Smith" entered), First name, Middle name, Generation, Title, SSN (with "222-11-1234" entered), Tax ID, Role (a dropdown menu with "Defendant (dft:pty)" selected), Pro se (a dropdown menu with "no" selected), Office, Address 1, Address 2, Address 3, City, State, Zip, County (a dropdown menu), Country, Phone, Fax, E-mail, and Party text. At the bottom, there is a Start date field (with "2/9/2002" entered) and three buttons: Submit, Cancel, and Clear.

- For a company, enter the entire company name in the **Last Name** field. Choose the appropriate **Role** from the drop down list. Click **[Submit]**.
- For an individual, fill out the **Last Name, First Name, Middle Name, Generation** and **Title** fields as appropriate. Choose the appropriate **Role** from the drop down list. Click **[Submit]**.
- If appropriate, add the **Party Text** field. The Party text field is for information regarding the position of the party in this case, such as "Trustee for the estate of Howard Hughes," "Executor for the Estate of Jimmie Hoffa" "Guardian for the minor of Jane Doe" " Governor of Puerto Rico" or " in his personal or official capacity". This will appear after the person's name on the cover of the docket sheet. Enter any appropriate information there.
- Leave all other fields blank.

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## Linking Documents (Refer to existing event)

Some pleadings such as Briefs and Indexes should be “linked” to their related documents in the case. When filing these and certain other types of documents you will be presented with the following screen.

The screenshot shows the ECF interface with a blue header bar containing the ECF logo and the word 'Civil'. Below the header, the title 'Other Documents' is displayed. A checkbox labeled 'Refer to existing event(s)?' is present, followed by 'Next' and 'Clear' buttons.

An “event” in CM/ECF is anything that has been filed in a case. To link the document you are currently filing to a previously filed document, check the box in front of “**Refer to existing event(s)?**” and click [Next].

This screenshot shows the same ECF interface, but with additional options for linking documents. Below the 'Other Documents' title, there is a prompt: 'Select the category to which your event relates.' This is followed by a list box labeled 'Type' containing the following items: adr, answer, appeal, appeal-cr, charge-cr, cja, cmp, detention-cr, and discov. Below the list box, there are two rows of input fields. The first row is labeled 'Filed' and the second row is labeled 'Documents'. Each row has two text boxes separated by the word 'to'. At the bottom, 'Next' and 'Clear' buttons are visible.

This screen requires that you filter the list of documents in the case by the type of document that you want to link to. The type list appears in alphabetical order. Document types in this list are the same as the types listed in the main filing menu. For example, to link to a Brief, you would choose the type “Oth\_Doc” because Brief appears in the

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“Other Documents” section of the main menu. You must choose a type on this screen. You also have the option of entering filed dates or document numbers if you would like to further narrow your search.

Once you select the type of document and click **[Next]** you are presented with a list of documents that match your search criteria. For this example we have selected Motion as the type.

**ECF** Civil • Criminal • Query • R

**Other Documents**

*Select the appropriate event(s) to which your event relates:*

☒ 05/01/2002 [2](#) MOTION for Preliminary Injunction by Attorney guestaty on behalf of Defendant Bob Stoops (guestaty, )

☐ 05/01/2002 [3](#) MOTION for Extension of Time by Attorney guestaty on behalf of Defendant Bob Stoops (guestaty, )

Click the checkbox for the document you wish to link to and click **[Next]**.

## Query Feature

Registered participants should use this feature to query the Electronic Case Filing (ECF) system for specific case information. To enter the Query mode, click on **Query** from the **Blue** menu bar of ECF.



ECF opens the **PACER Login** screen. You must enter your **PACER** login and password before ECF permits you to query the ECF database.

**Note:** Your PACER login and password are different from your ECF login and password. You must have a PACER account in order to retrieve, view, and print certain documents. Beginning July 2002, you will be charged a fee of \$.07 per page to access documents, docket sheets, etc. from ECF.

After you enter your PACER login and password, ECF opens a Query data entry screen as depicted below. If you know the number that the Court has assigned to the case, enter it in the **Case Number** field and click on the **[Run Query]** button. ECF opens the query screen depicted in Figure B on the next page.

A screenshot of the 'Query' screen in the ECF system. The page has a blue header with the 'ECF' logo and navigation links: 'Civil', 'Criminal', 'Query', 'Reports', 'Utilities', and 'Logout'. A yellow question mark icon is on the right. Below the header, the word 'Query' is written in large blue letters. The main content area is a light yellow box titled 'Search Clues'. It contains several search criteria: 'Case Number' with a text input field containing '00-101' and examples '(Examples: 99-500, 1:99cv500)'; 'Def Number' with an empty text input field; 'Filed Date' and 'Last Entry Date' each with two text input fields separated by 'to'; 'Nature of Suit' with a dropdown menu showing '0 (zero)', '110 (Insurance)', and '120 (Contract: Marine)'; 'Last Name' with a text input field and examples '(Examples: Desoto, Des\*t)'; 'First Name' and 'Middle Name' each with a text input field; and 'Type' with a dropdown menu. At the bottom of the yellow box are two buttons: 'Run Query' and 'Clear'.

You may query the ECF database by the name of a party or an attorney to the case. Enter the last name of the party in the appropriate field. If more than one person with that name is in the database, ECF returns a screen (see the following page) from which to select the correct name. If you click on

the name of the party, ECF will open the query screen depicted in Figure B. If the individual is a party to more than one case, ECF will open a screen listing all of the party's cases. Click on the case number hyperlink and ECF opens the query screen depicted in Figure B.

**Figure A**

**ECF** Civil • Query • Reports • Utilities • Logout

**Select A Person**

There were 2 matching persons.

[Jackson, David A.](#) (aty)

[Jackson, Thomas Charles](#) (aty)

After querying the database by case number, name, or nature of suit, ECF opens the **Query** window for the specific case you selected. See Figure B.

You may also query a case by the nature of suit. You must enter a range for either the filed date or the last entry date in order for the query to run. To search for all cases of a certain type, use the date 1/1/1970 as the "beginning of time." When you run the query, if there is more than one case that meet those criteria, you will get a screen similar to the one in Figure A, but listing multiple case numbers.

**Figure B**

**3-01-01465-JR HARRELL V. MATOS**  
Héctor Laffitte, presiding  
**Date filed:** 07/02/2001 **Date of last filing:** 08/20/2001

**Query**

[Alias](#)  
[Associated Cases](#)  
[Attorney](#)  
[Case Summary](#)  
[Deadline/Hearing](#)  
[Docket Report](#)  
[Filers](#)  
[History/Documents](#)  
[Party](#)  
[Related Transactions](#)  
[Status](#)

At the top of the window, ECF displays the case number, parties to the case, presiding Judge, date that the initial claim was filed, and date of last filing for the case. You may choose specific case information from a large list of query options by clicking on the appropriate hyperlinked name on the screen. The following paragraphs describe several of the available case-specific query options.

## **Attorney**

Displays the names, addresses, and telephone numbers of the attorneys who represent each of the parties to the case.

## Case Summary

Provides a summary of current case-specific information as represented below.

<b>3-01-01465-JR HARRELL V. MATOS</b>			
Héctor Laffite, presiding			
<b>Date filed:</b> 07/02/2001 <b>Date of last filing:</b> 08/20/2001			
<b>Case Summary</b>			
<b>Office:</b>	San Juan	<b>Filed:</b>	07/02/2001
<b>Jury Demand:</b>	Both	<b>Demand:</b>	
<b>Nature of Suit:</b>	442	<b>Jurisdiction:</b>	Federal Question
<b>Cause:</b>	28:1983 Civil Rights	<b>Disposition:</b>	
<b>County:</b>		<b>Terminated:</b>	
<b>Origin:</b>	1	<b>Reopened:</b>	
<b>Lead Case:</b>	None		
<b>Related Case(s):</b>	None		
<b>Flags:</b>	JURY, TYPE-H		
<b>Party 1:</b>	WAYNE HARRELL (pla)		
<b>Party 2:</b>	MATOS (DFT)		
<b>Atty:</b> Ruth Ann Lowery	<b>Represents Party 1:</b> pla	<b>Phone:</b> (202) 789-6064	
		<b>Fax:</b> (202) 789-6190	
		<b>E-mail:</b> rlowery@bdlaw.com	
<b>Atty:</b> David A. Jackson	<b>Represents Party 2:</b> dft	<b>Phone:</b> (202) 724-6618	

## Deadlines/Hearings

Produces a screen that allows you to query the database by various means to obtain hearing and other schedule deadlines. If you query as illustrated below, ECF opens the **Deadline/HeDeadlines/Hearings** screen depicted on the next page.

**Deadlines/Hearings**

Sort by Due/Set

Document Number

Deadline/Hearing

Filed

Due/Set

Satisfied

Terminated

After the window opens, if you click on a document number, ECF will display the actual Scheduling Order for the conference or hearing.

**ECF**
Civil • Criminal • Query • Reports • Utilities • Logout

**3:02-cr-00078-JAF USA v. Trubb**  
Date filed: 05/01/2002

### Deadlines/Hearings

Doc. No.	Deadline/Hearing	Event Filed	Due/Set	Satisfied	Terminated
<a href="#">1</a>	Arraignment	05/01/2002	05/03/2002 at 02:00 PM		

If you click on the button to the left of the Deadline/Hearing title, ECF will display the docket information and related docketing entries for the hearing that you selected.

## Docket Report

When you select Docket Report, ECF opens the Docket Sheet screen as depicted below.

**ECF**
Civil • Criminal

### Docket Sheet

Case number

☒ Filed  to 
  
☐ Entered  to

Documents  to

☒ Include terminated parties  
☐ Include links to Notice of Electronic Filing  
☒ Include Caption

Sort by

You may select a date range for your docketing report as well as a range of docketing numbers. If you leave the range fields blank, ECF will default to print the entire docketing report. Place a checkmark in the box to **Include links to Notice of Electronic Filing** if you wish to view them from the docket sheet. After you have selected the parameters for your

report, click on the **[Run Report]** button. ECF will run your custom docketing report and display it in a window as depicted.

## History/Documents

This selection queries the database for case event history and documents associated with the case. After you click on the **History/Documents** hyperlink, ECF opens the screen depicted in Figure 24. You may select the sort order for the query report and choose to exhibit all events or only those with documents attached. ECF also offers you the option to display the docket text in the report.

**Figure 24**

The screenshot shows the ECF web interface. At the top is a blue navigation bar with the ECF logo and links for Civil, Query, Reports, and Utilities. Below this, the page title is 'History/Documents'. The main content area contains three radio buttons: 'All events (history)' (which is selected), 'Only events with documents', and a checked checkbox for 'Display docket text'. Below these is a 'Sort by' dropdown menu that is open, showing three options: 'Most recent date first' (which is selected), 'Oldest date first', and 'Most recent date first'. At the bottom of the form are two buttons: 'Run Query' and 'Clear'.

After making your selections, click on the **[Run Query]** button. ECF queries the database and builds your report. Figure 24A depicts a portion of a **History/Documents** report. This particular report lists all of the events and documents associated with the case in reverse chronological order. It also displays the docketing text for all docketed events.



**Figure 24A**

CM/ECF					
Civil • Criminal • Query • Reports • Utilities • Logout					
3:03-cv-01001-JAF USA v. Doe					
Jose A Fuste, presiding					
Date filed: 11/05/2003 Date of last filing: 11/05/2003					
History					
Doc. No.	Dates	Description	Private Event	Type Subtype	Docket Part ID
<a href="#">1</a>	Filed & Entered: 11/05/2003	Complaint		comp comp	8
<a href="#">2</a>	Filed & Entered: 11/05/2003	Motion for Preliminary Injunction		motion prelinj	11

You may view a PDF file of actual documents by clicking on the document number in the far-left column of the onscreen report.

### Other Queries

The process for selecting and running other queries in the **Query** feature of ECF is similar to what has been described above.

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## Reports Feature

The Reports feature of ECF provides the user with several report options. After selecting the Reports feature from the *Blue* menu bar, ECF opens the **Reports** screen depicted in Figure 25.

**Figure 25**

If you select Cases Filed or Docket Sheet from the screen depicted in Figure 25, ECF will ask you to login to PACER. You may view Court Calendar Events for a case without logging into PACER.

### Docket Sheet

Click on the **Docket Sheet** hyperlink in Figure 25 and ECF opens the **PACER** login screen.

Enter your **PACER** login and password. Click on the **[Login]** button and ECF will open the Docket Sheet report query window depicted below.

This is the same query window that ECF displayed when you selected **Docket Report** from the **Query** feature (Page 29). Enter the case number for your docket sheet in the **Case**

**Number** field. Select parameters for the remainder of the data entry fields and click on the **[Run Report]** button. ECF will display a full docket sheet for the case you selected. See the **Query** feature section of this manual for a depiction of a partial docket sheet report. If you do not need a complete docket sheet, you can narrow the query using the date filed/entered fields. ECF also offers various sorting options from the Docket Sheet query screen.

## Civil Cases Report

The **Civil Cases** report provides you with the flexibility to query the ECF database to locate cases electronically filed within a specific date range, or by Nature of Suit and Cause Code. When you click on the **Civil Cases** hyperlink, ECF displays a query screen as depicted here.

The screenshot shows the ECF (Electronic Case Filing) interface for the Civil Cases Report. The top navigation bar includes links for Civil, Criminal, Query, Reports, Utilities, and Logout, along with a help icon. The main title is "Civil Cases Report". Below this, there are several input fields and dropdown menus for filtering cases:

- Office:** A dropdown menu showing "San Juan".
- Case type:** A dropdown menu with "Civil" and "Miscellaneous" options.
- Nature of suit:** A dropdown menu with "0 (zero)" and "110 (Insurance)" options.
- Case flags:** A dropdown menu with "APPEAL" and "ARBITRATION" options.
- Cause:** A dropdown menu with "0 (No cause code entered)" and "02:0431 (02:431 Fed. Election...)" options.
- Filed:** Two date input fields, "10/29/2003" and "11/5/2003", with a "to" label between them.
- Terminal digit(s):** An input field with "2, 4-7" as a hint.
- Open cases:** A checked checkbox.
- Closed cases:** An unchecked checkbox.
- Sort by:** A dropdown menu showing "Case Number" and two empty dropdown menus.
- Buttons:** "Run Report" and "Clear".

**Note:** If you are not logged into **PACER**, ECF will display the **PACER** login screen. Login to **PACER** and ECF will open the **Civil Cases Report** screen.

Enter the range of case filing dates for your report and select a Nature of Suit or Cause Code, if you wish to narrow your search. If you leave all fields blank, ECF will display a report for all cases opened in ECF. This picture depicts part of a report of all cases filed in ECF at the U.S. District Court from 9/23/2002 to 10/23/2002.

ECF Civil • Criminal • Query • Reports • Utilities • Logout ?				
Civil Cases Report				
United States District Court for the District of Puerto Rico -- Train Database				
Filed Report Period: 01/02/2001 - 11/05/2003				
Case Number/ Title	Date Filed/ Reopened/ Added	Date Closed/ Reclosed	Days Pending	Notes
<a href="#">3:03-cv-01001-JAF</a> USA v. Doe	<i>Filed:</i> 11/05/2003		0	<i>Cause:</i> 29:621 Job Discrimination (Age) <i>NOS:</i> Civil Rights: Jobs <i>Office:</i> San Juan <i>President:</i> Jose A Fuste <i>Jury demand:</i> Plaintiff
<a href="#">3:03-cv-01000-JAF</a> Sepulveda v. Commissioner HHS	<i>Filed:</i> 06/23/2003		135	<i>Cause:</i> 12:105 Review of HHS Decision (DIWC) <i>NOS:</i> Social Security: DIWC/DIWW <i>Office:</i> San Juan <i>President:</i> Jose A Fuste <i>Jury demand:</i> None

The far-left column of the Cases Filed report contains hyperlinked case numbers. If you click on a particular case number, ECF opens the **Docket Sheet** report window from which you can retrieve the docket sheet for the selected case. Follow the instructions in the previous section for a Docket Sheet report.

## Utilities Feature

The **Utilities** feature provides the means for registered users to maintain their account in ECF and to view all of their ECF transactions.

ECF	Civil • Criminal
Utilities	
Your Account	
<a href="#">Maintain Your Account</a>	
<a href="#">View Your Transaction Log</a>	
Edit Data	
Miscellaneous	
<a href="#">Legal Research ...</a>	
<a href="#">Mailings...</a>	
<a href="#">Verify a Document</a>	

## Your Account

This section of the **Utilities** feature provides you the capability to maintain certain aspects of your ECF account with the Court and to view a log of all your transactions within ECF.

## Maintain Your Account

Click on the **Maintain Your Account** hyperlink to open the **Maintain User Account** information screen.

Maintain User Account

Last name  First name

Middle name  Generation

Title  Type

Office

Address 1

Address 2

Address 3

City  State  Zip

Country  County

Phone  Fax

Bar Id  Bar status

Initials  DOB  AO code  End date

Email information... More user information...

Submit Clear

This screen displays all of the registration information that is contained within the ECF database for your account with the Court. This includes Bar Identification and Bar status. **DO NOT CHANGE YOUR MAILING ADDRESS. CONTACT THE CLERK'S OFFICE TO REQUEST A CHANGE OF ADDRESS .**

Clicking on the **[E-mail information]** button opens the following screen.

E-mail information for wes

Primary e-mail address

Send the notices specified below

☒ to my primary e-mail address

☐ to these additional addresses

☒ Send notices in cases in which I am involved

☐ Send notices in these additional cases

☒ Send a notice for each filing

☐ Send a Daily Summary Report

Format notices ☒ html format for Netscape or ISP e-mail service

☐ text format for cc:Mail, GroupWise, other e-mail service

Return to Account screen Clear

ECF will E-mail to parties their **Notices of Electronic Filing** based upon the information entered in this screen. Perform the following steps to enter additional e-mail addresses for individuals that you wish ECF to notify regarding new case

pleadings and documents.

- From the above screen, enter a check mark by clicking on the box to the left of the line, which reads “**to these additional addresses**”.
- Enter the e-mail addresses of those individuals you wish to notify concerning ECF activity. This data entry field has a capacity of 250 characters for approximately ten E-mail addresses.

**The following screen shows the additional e-mail addresses entered:**

E-mail information for wes

Primary e-mail address

Send the notices specified below

☒ to my primary e-mail address

☒ to these additional addresses

☒ Send notices in cases in which I am involved

☐ Send notices in these additional cases

☒ Send a notice for each filing

☐ Send a Daily Summary Report

Format notices ☒ html format for Netscape or ISP e-mail service

☐ text format for cc:Mail, GroupWise, other e-mail service

- Stipulate the format of the ECF notices by selecting your choice from the bottom of the screen.
- If you wish to enter completely new information about your account, use the [Clear] button to clear the fields on this screen.

After updating your account information, click on the [Return to Account screen] button to return to your **Maintain User Account** screen.

To edit or view login information about your account, select the button labeled **More user information**, from the **Maintain User Account** screen. ECF opens the screen depicted in Figure 32.

**Figure 32**

More User Information for wes

Login  Last login 08-31-2001 11:03

Password  Current login 09-04-2001 11:03

Prid 2231 Create date 08/02/2001

Registered  Update date 08/16/2001

Groups Quality Control

This screen displays user login information and provides the means to change your ECF password. Notice that ECF displays a string of asterisks in the **Password** field. To change your ECF password, place your cursor in the **Password** field and delete the asterisks. Type in your new password. ECF displays the actual characters of your new password as you type. When you have completed your interface with ECF from this screen, click on the **[Return to Account screen]** button to reopen the **Maintain User Account** screen. When you are satisfied that all of your account information is accurate and up-to-date, click on the **[Submit]** button at the bottom of the **Maintain User Account** screen to submit your changes to ECF. ECF will notify you onscreen that your updates were accepted. If you changed passwords, you may begin using the new password during your next ECF session.

### View Your Transaction Log

From the **Utilities** screen, click on the **[View your Transaction Log]** button. ECF opens a screen with two fields for entering the Date Selection Criteria for a Transaction Log Report. Enter the date range for your report and click on the **[Submit]** button. ECF displays a report of all your transactions in ECF within the date range you specified for Date Selection Criteria. See Figure 33 for a sample transaction log report.

**Figure 33**

Transaction Log			
Report Period: 08/16/2001 - 09/04/2001			
Id	Date	Case Number	Text
3212	08/22/2001 15:45:54	01-4011	First MOTION for Permanent Injunction by ARLENE ACKERMAN. Responses due by 9/4/2001. Replies due by 9/11/2001. (Attachments: # (1) Exhibit Test Document)(wes,)
3326	08/27/2001 11:44:12	01-4011	First MOTION for Preliminary Injunction by ARLENE ACKERMAN. Responses due by 8/30/2001. Replies due by 8/30/2001. (wes,)
3330	08/27/2001 12:01:51	01-4011	RESPONSE in Opposition re [2] filed by DE'MITRIA RICE. (wes,)
3331	08/27/2001 12:05:13	01-4011	ORDER temporarily granting Motion for Preliminary Injunction [2]. Motion referred to thsckf. Signed by Judge sullivan emmett g on 08/28/01. (wes,)
3335	08/27/2001 14:23:52	01-4011	RESPONSE to Motion re [2] <i>Preliminary Injunction</i> filed by DE'MITRIA RICE. (Attachments: # (1) Exhibit Exhibits are being held in the Clerk's office in paper format)(wes,)
3336	08/27/2001 14:30:43	01-4011	RESPONSE to Motion re [1] <i>Permanent Injunction</i> filed by ARLENE ACKERMAN. (Attachments: # (1) Exhibit exhibits are being held in the Clerk's office in paper)(wes,)
3337	08/27/2001 15:49:55	01-4011	Second MOTION for Preliminary Injunction <i>by plaintiff for defendant to cease and desist the assignment of plaintiff to cafeteria duty</i> by ARLENE ACKERMAN. Responses due by 8/31/2001. Replies due by 8/31/2001. (wes,)
3338	08/27/2001 16:18:42	01-4011	MOTION for Preliminary Injunction <i>to cease and desist from assigning plaintiff to work as a cafeteria monitor</i> by DE'MITRIA RICE. Responses due by 8/31/2001. Replies due by 8/31/2001. (wes,)
3339	08/28/2001 10:19:15	01-4011	Second MOTION for Preliminary Injunction <i>to cease and desist the assignment of plaintiff to cafeteria monitor</i> by DE'MITRIA RICE. Responses due by 9/10/2001. Replies due by 9/14/2001. (wes,)
3431	09/04/2001 14:21:26		Updated person record: wes Prid: 2231
3431	09/04/2001 14:21:27		Updated user record: shortw 2231
Total Number of Transactions: 11			

Use this feature of ECF to review your transactions and to verify that:

- all of the transactions you entered are reflected in the Transaction Log
- no unauthorized individuals have entered transactions into ECF using your login name and password.

---

## Miscellaneous

ECF provides three **Miscellaneous** functions within the Utilities feature of the system.

- Legal Research
- Mailings
- Verify a Document

When you click on the **Legal Research** hyperlink from the **Miscellaneous** screen, ECF opens a new screen that contains hyperlinks to a Law Dictionary, a Medical Dictionary, and Westlaw via the Internet. Select the **Verify a Document** hyperlink to open a query screen and enter data in the screen fields to locate a particular document attached to a specific case number. There is also a **Mailings** hyperlink that opens a new screen for making or requesting mailings from ECF.

## Logout

After you have completed all of your transactions for a particular session in ECF, you should exit from the system.



Click on the **Logout** hyperlink from the ECF **Blue** menu bar. ECF will log you out of the system and return you to the ECF login screen.



---

# ***Appendix A***

## **Portable Document Format**

### **Setting Up the Acrobat PDF Reader**

Users must set up Adobe's Acrobat Reader software in order to view documents that have been electronically filed on the system. All pleadings must be filed in PDF format. When installing this product, please review and follow Adobe's directions to utilize Acrobat Reader after installation.

### **Portable Document Format (PDF)**

Only PDF (Portable Document Format) documents may be filed with the court using the ECF system. Before sending the file to the court, users should preview the PDF formatted document to ensure that it appears in its entirety and in the proper format.

#### **How to View a PDF File**

- Start the Adobe Acrobat program.
- Go to the ***File*** menu and choose ***Open***.
- Click on the location and file name of the document to be viewed.
- If the designated location is correct, and the file is in PDF format, Adobe Acrobat Exchange loads the file and displays it on the screen.
- If the displayed document is larger than the screen or consists of multiple pages, use the scroll bars to move through the document.
- Click on the ***View*** menu for other options for viewing the displayed document. Choose the option that is most appropriate for the document.

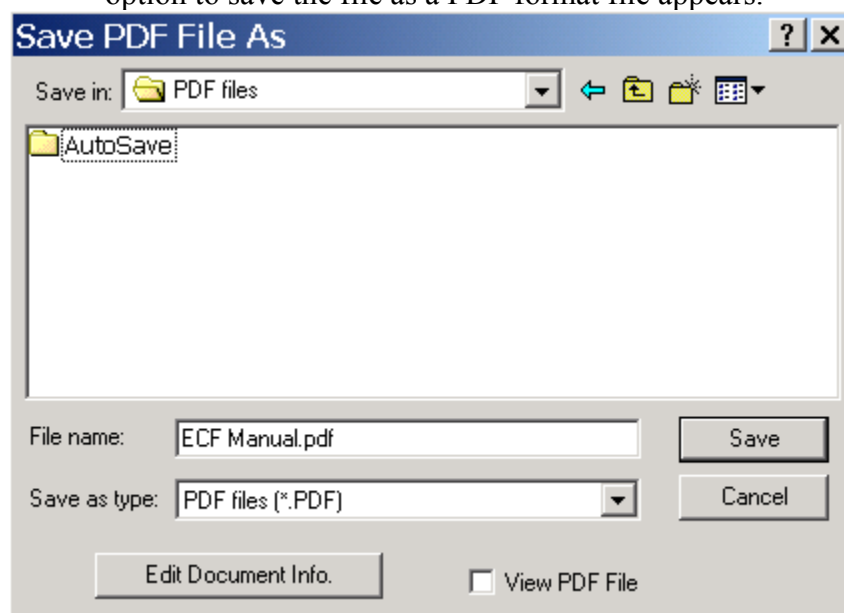
#### **How to Convert Documents to PDF Format**

You must convert all of your documents to PDF format before submitting them to the Court's Electronic Case Filing (ECF) system. The conversion process requires special software such as Adobe Acrobat Writer or FinePrint pdfFactory. WordPerfect versions 9 and 10 have Acrobat Writer built-in and can also be used to convert documents to PDF.

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### Using any word processing program:

- Install Acrobat Writer or FinePrint pdfFactory on your computer
- Open the document to be converted
- Select the **[Print ]** option (generally found in the File menu) and in the dialog box select the option to change the current printer. A drop down menu with a list of printer choices is displayed.
- Select **Adobe PDFWriter** or **FinePrint pdfFactory\***
- “Print” the file. The file should not actually print out; instead the option to save the file as a PDF format file appears.



- Make a note of the file location so you can find the document later when you are ready to upload it. Change the location if necessary by clicking in the “Save in” area of the window.
- Name the file, giving it the extension .PDF and click the **[Save]** button.

*Depending on the word processing program being used, it may be necessary to find the printer selection option elsewhere. At that point, change the printer to Adobe PDFWriter, and follow the directions above.*

*\*You must have either Adobe Acrobat Writer or FinePrint pdfFactory installed on your computer to see these choices listed.*

